Manual Toastar

Version 1.0
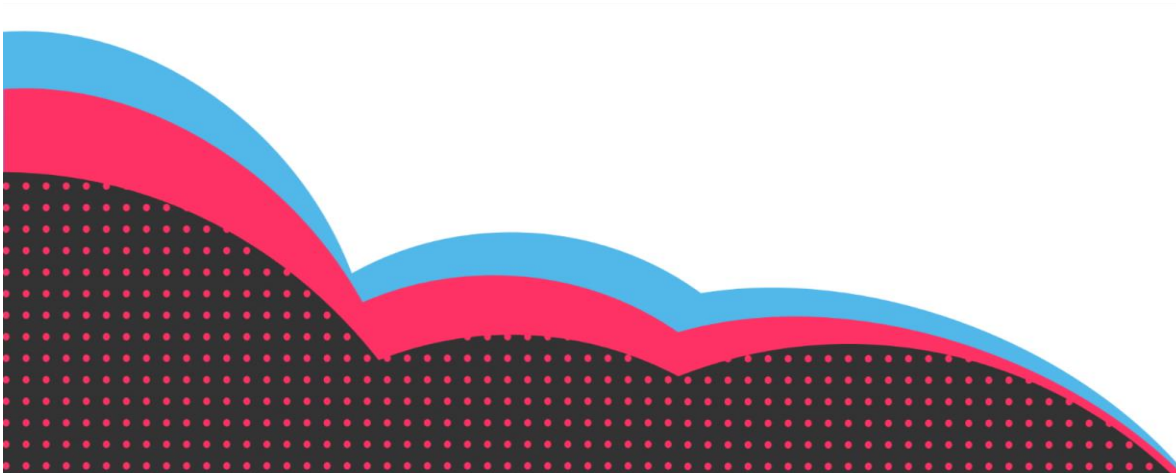
Inhoud

Toastar

Three most important functionalities:

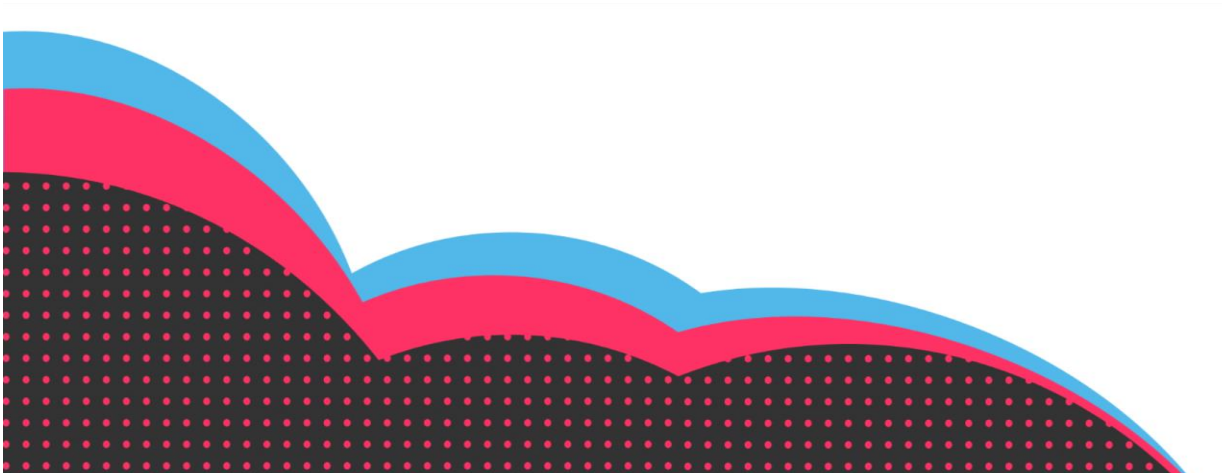• F8 = call a selected phone number
Select any desired phone number, with the F8 key the number is called directly from Toastar, the Toastar screen shows all available information.

• F9 = Show Toastar search screen
Find contacts quickly and can call or send messages directly. Being able to access all customer data from the search screen.

• Show "Customer" information
Toastar extracts customer information from all available databases and displays the information in one screen.

Call a selected phone number

When a telephone number is outside the application, for example when it is in a file or on a web page, you can easily call this number by following two steps:

1. Select the relevant number with the mouse. You can simply select characters such as +, (), etc.
2. Press the F8 button (or the other preferred button). The system calls the selected number. (see settings for other shortcut)

This prevents various copy / paste actions being required before the number can be called.

Toastar search

The Toastar search screen is displayed with the F9 function key.
A search query shows all available contacts related to the search query.
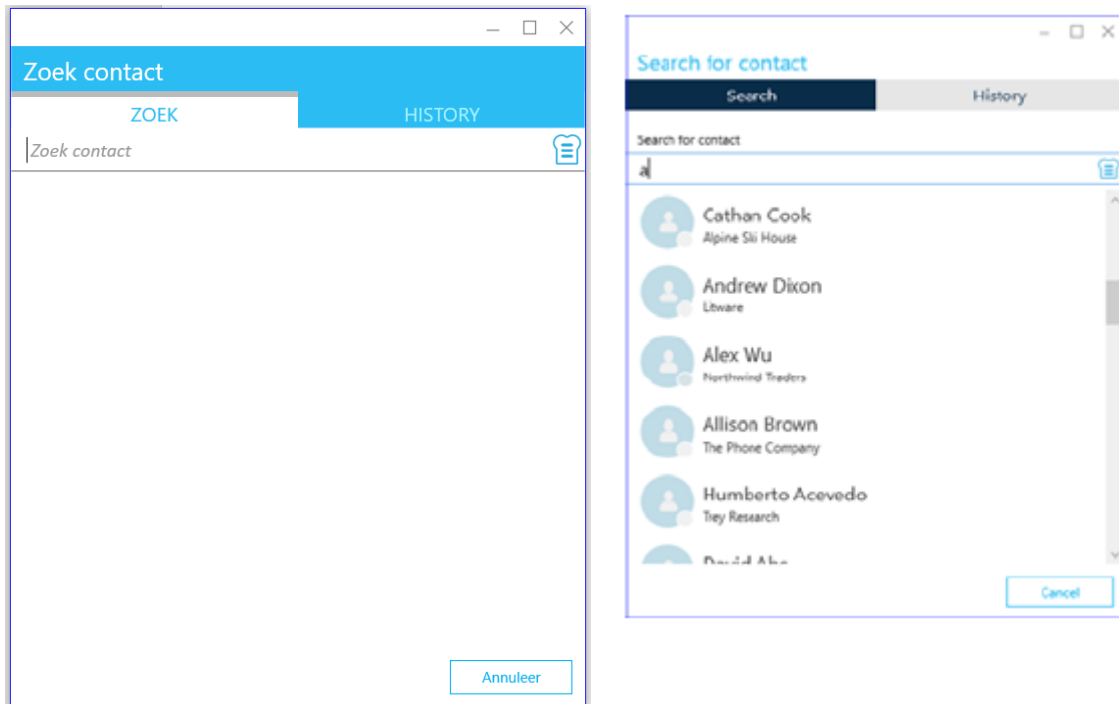
Select the desired contact and a menu with two icons appears.

 start a telephone conversation, the conversation is opened in Toastar where the phone functionalities become available.

 send a chat message (Skype for Business), the chat is opened in the Skype for Business screen, where the Skype for Business functionalities become available.

The arrow next to the telephone icon shows a window the contact information of this relation. By selecting one of the numbers or the email address, the toastar screen opens and the contact is called with your phonesystem.
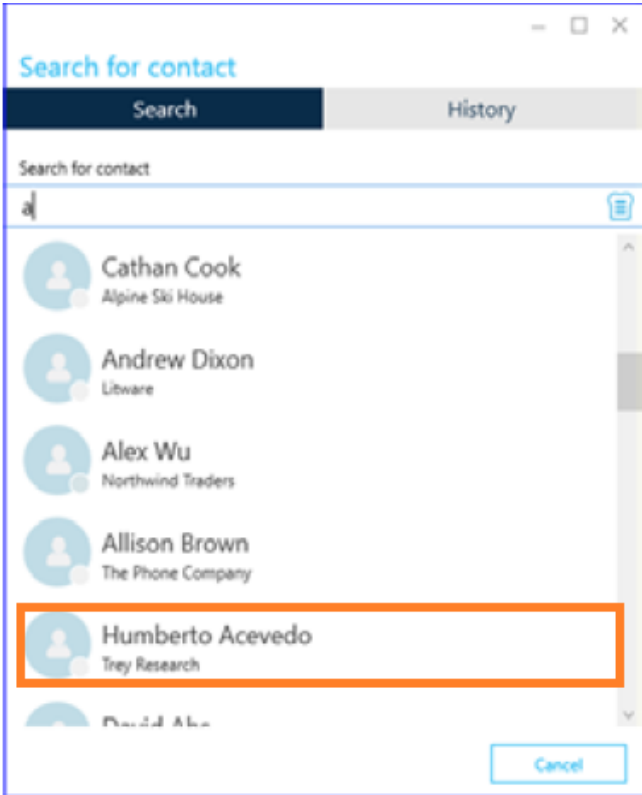

By clicking on the contact with the **<u>right</u>** mouse button a pop-up window appears with the contact information of the relation.
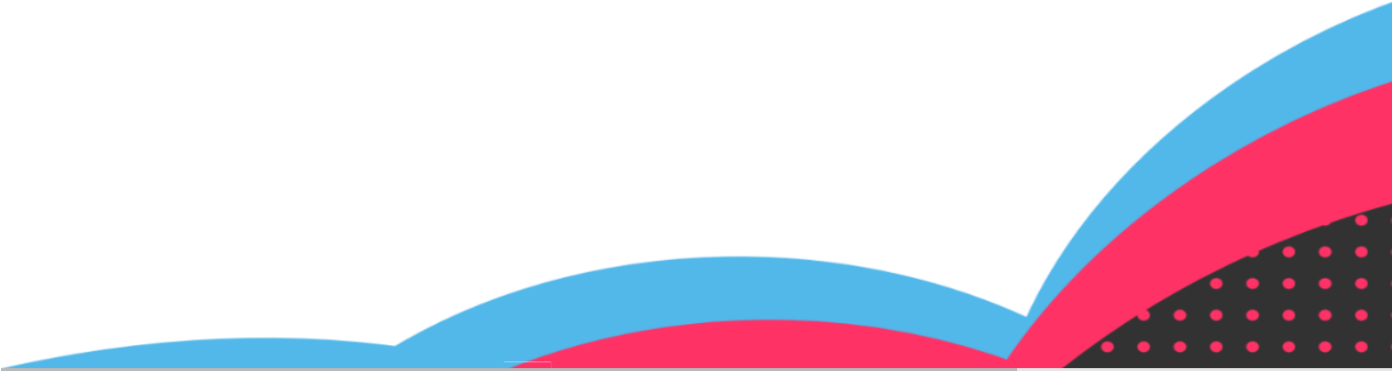
If the "Toast" option is checked, when selecting one of the "numbers" at the bottom right of the screen a window will appear with contact information, from which you can call immediately. Click on the "Toast" to display the contact's CRM data.
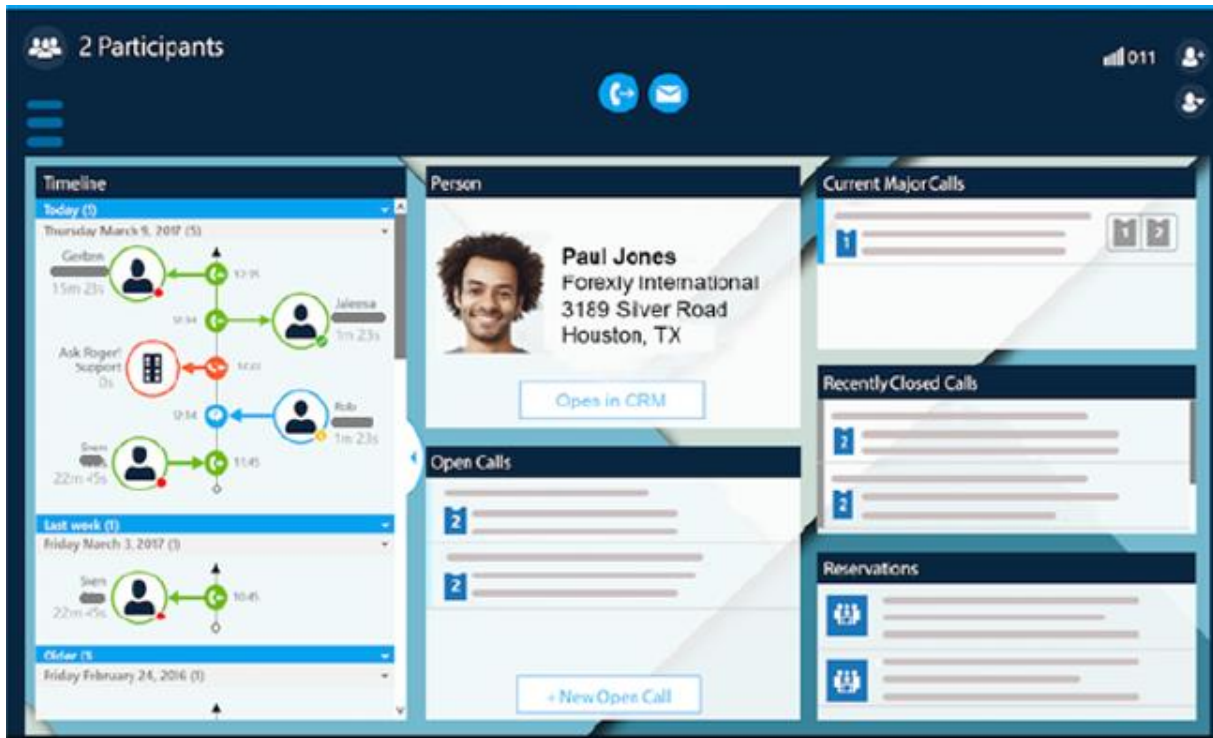

The images may differ from reality and depend on the chosen device.
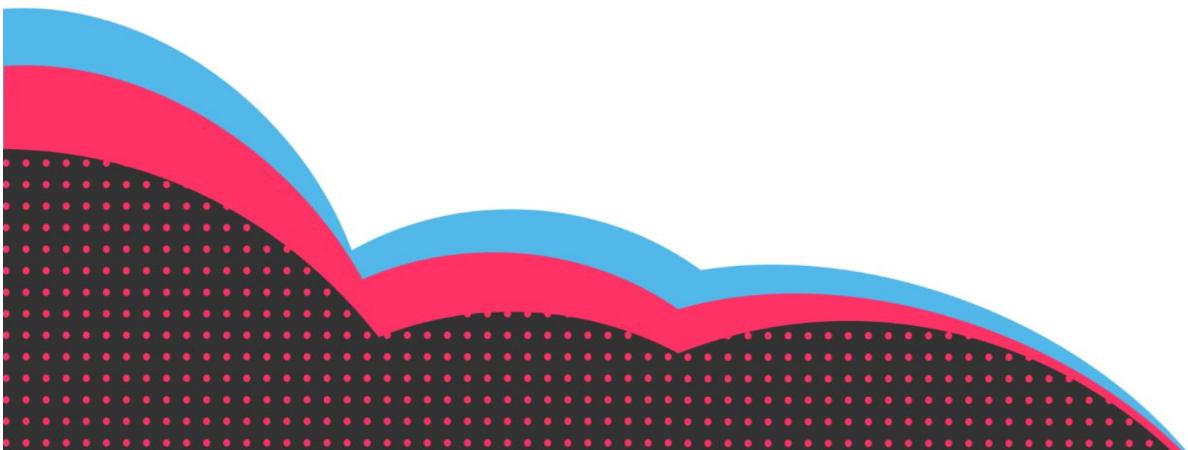
"Customer" information

If the "Toast" option is not checked, a window will appear with the CRM data of this relation when selecting one of the "numbers".

The available links in this screen, such as "Open CRM", give access to the customer card in the integrated CRM package.

The Timeline screen provides insight into the contact history of your contact person and shows which people within the organization have been in contact.

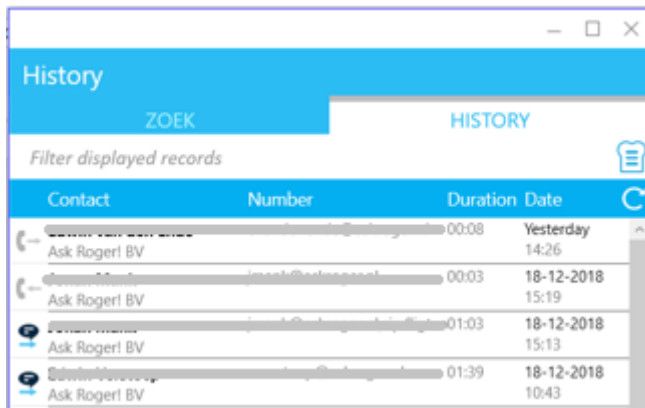Other fields can be set on request.

Callback note

When a caller is looking for a colleague, but he is not present, the Toastar can quickly and easily create a callback note in Outlook. This contains all relevant customer data with the request to call back. The user only needs to send the mail.
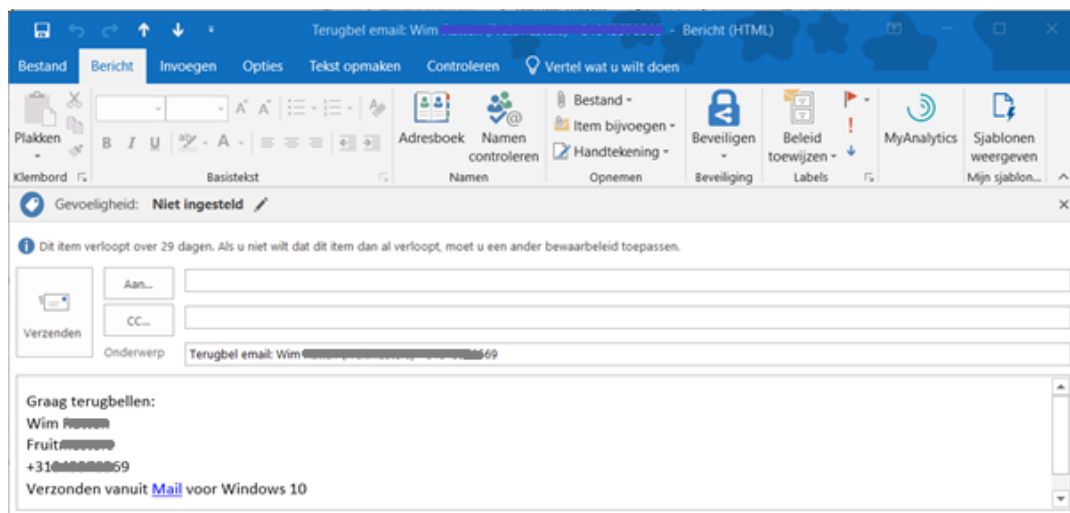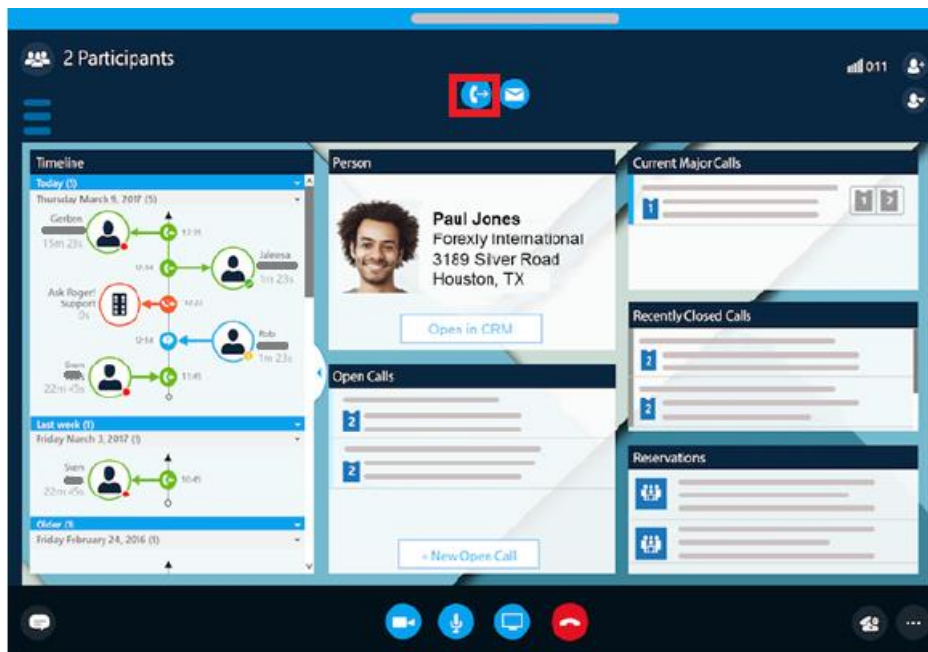
Conversation history

The "History" tab in the Toastar search screen shows the conversation / chat history.
This way you can call this relation by clicking on the number or email address next to the name.

Transfer

When you have a call that you want to transfer, select the transfer button.

From here you open the contact list and you can search for who you want to transfer with two options.
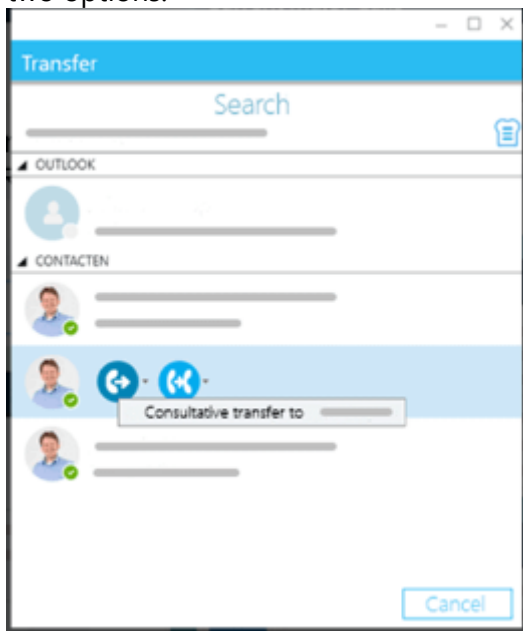

1. Announced transfer
2. Transfer unannounced

With announced transfer you can first indicate who you are on the line and whether it is convenient to transfer, for example. Option two ensures that you immediately continue the conversation without having to park the conversation in advance.
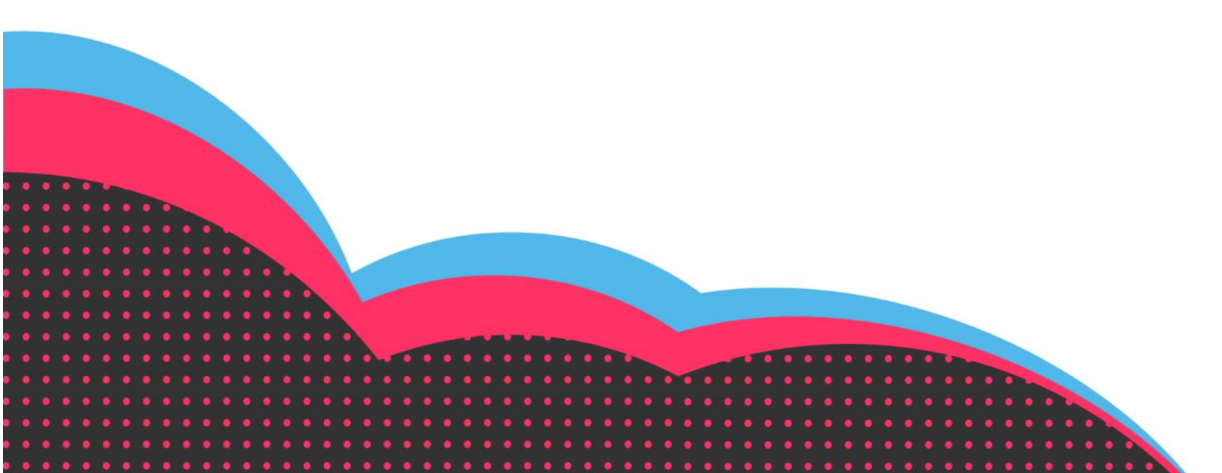
Toastar Mobile

Toastar for Mobile can be downloaded from the play store or apple store. You need your login details which you also use for Toastar Desktop.
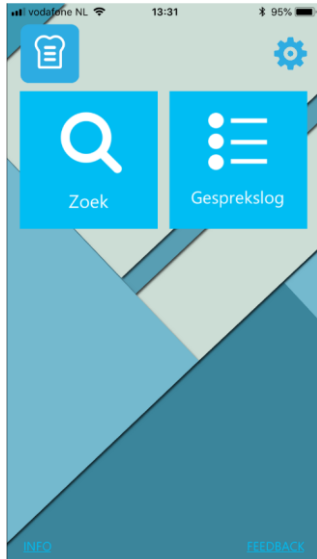
After you have logged in, the screen above will be displayed.

Search

As you are used to from the Desktop Toastar, you can also search for multiple contacts in multiple linked sources. You can also select these contacts directly and call from your mobile device.
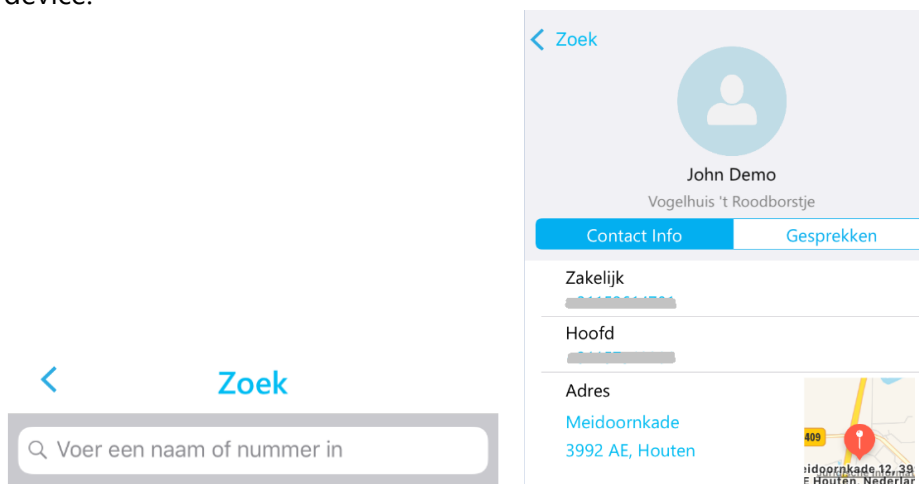
Conversation history

Here you can view your conversation history, the screen works in the same way as the history field on the desktop Toastar.
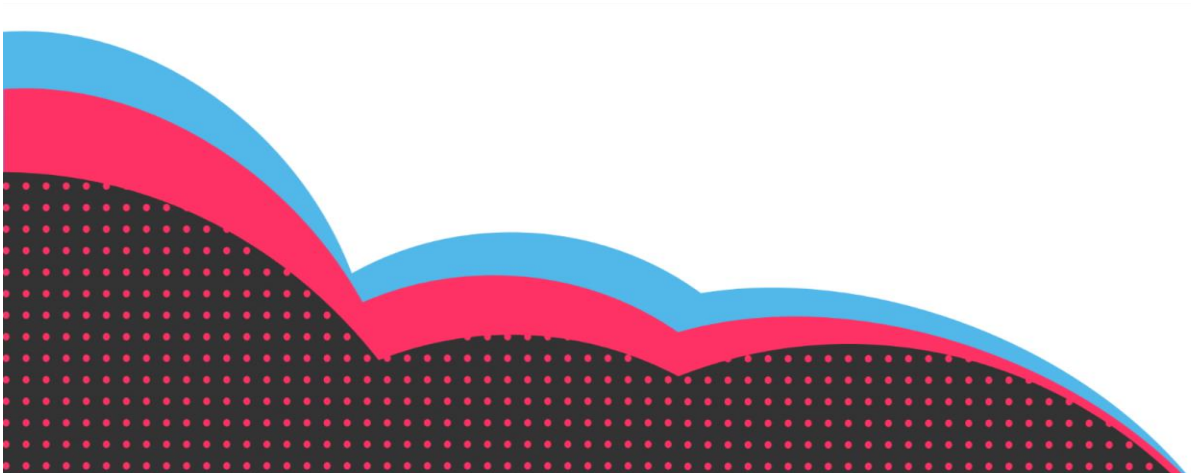
Settings

You can view and adjust a number of settings via the Toastar settings menu:

1. Start on Windows, with this option on, Toastar is automatically started when Windows is started.
2. With the option Outlook contacts, your contacts from Outlook are also displayed in Toastar. This can be easy when there are also many contacts here. Multiple data sources are then searched. This option can cause duplicate contacts to be displayed in the search screen. That is why this option can also be disabled.
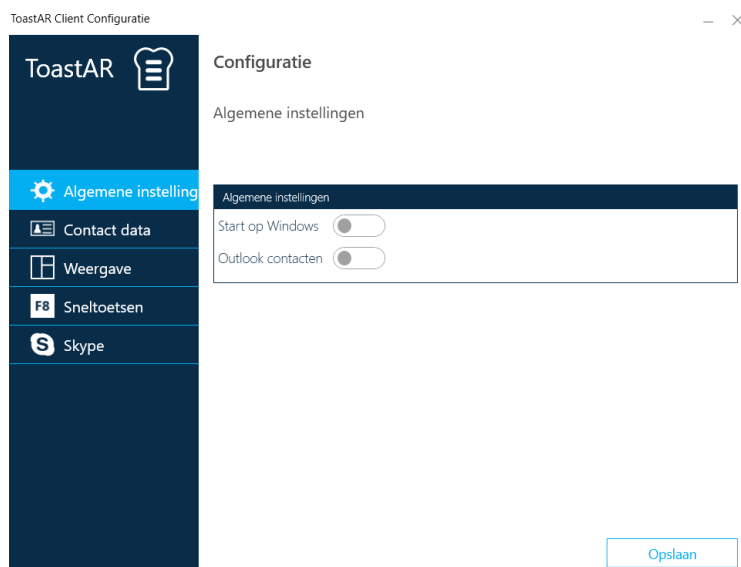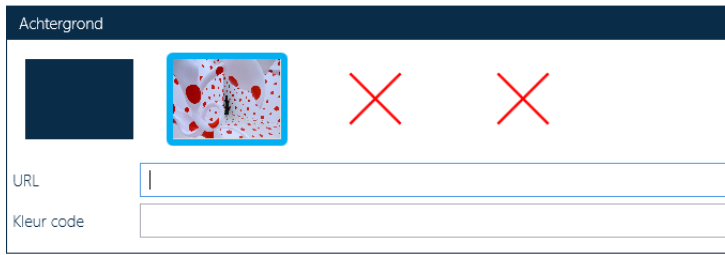

Display
The display of Toastar can be adjusted yourself. For example, a standard view is displayed in the blue Toastar color.
A changing theme can also be chosen or a link to an image on the internet can be used. The user can adjust this setting himself. (see next page)

Configuratie

Gespreks venster

Shortcuts

Shortcuts ensure that you can quickly call a number without copy / paste and quickly open the search screen for the user. These shortcuts are standard F8 and F9, but this is not a desirable shortcut in some situations. In this menu you can indicate whether and, if so, which shortcut you want to set. You do this in the shortcut window (red)
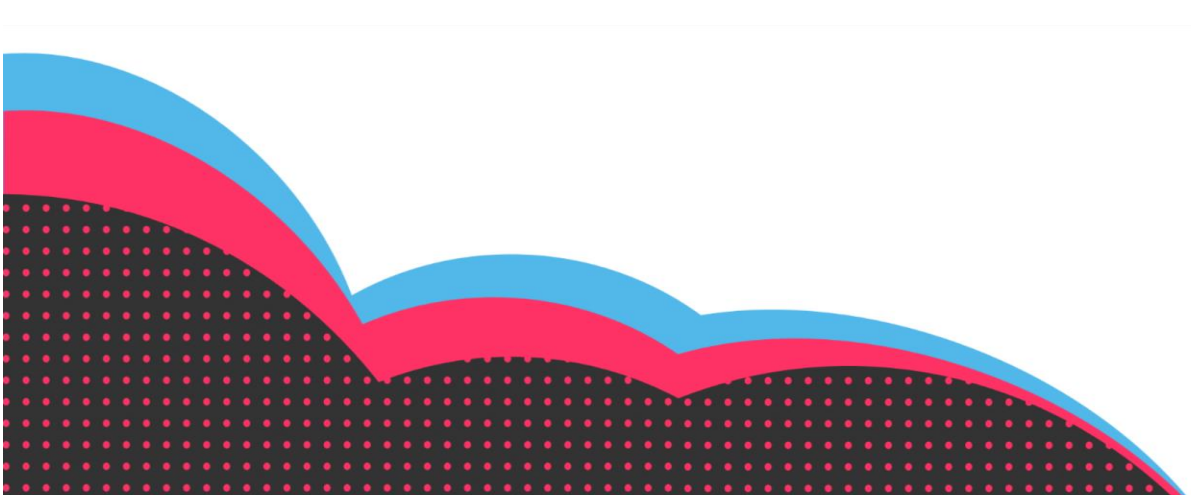
<u>Skype (Options only for Skype)</u>

If you use Toastar in combination with Skype for Business, you have an additional option, Skype in the menu.

You can adjust the following options:

1. Decline second call, with this you can set that if your call is not yet completed you will not be offered a new call. This often causes unrest or errors.
2. Show SKYPE FOR BUSINESS contacts ensures that the contacts you have added in Skype for Business are also displayed in your Toastar search screen
3. Close after conversation. This allows you to choose whether the Toastar screen will close after a call or whether it will remain active. This last option can be interesting, for example, if you still want to perform administrative actions after the conversation for which you want to use the Toastar.

— ✕

Configuratie

Skype

Decline second call   ⬤

Show SfB contacts   ✓⬤

Close after conversation   ⬤